

## erwin DI Suite

# Requirements Manager

### Quick Start User Guide 9.3

#### About Requirements Manager

The Requirements Manager module lets you document all your requirements and functional specifications and link them to the Source-to-Target Mappings and Test cases and generate enterprise wide traceability.

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## 1. Overview

The **Requirements Manager module** helps you design your own master templates with the required artifacts so that consistent standards can be followed. This helps an organization create their own master templates for capturing requirements and users creating the requirements would be following a published enterprise standard.

Every template can have its own set of artifacts. This is completely at the discretion of the administrator who is setting up or creating these master templates for the organization to use.

Artifacts can include standard sections like *"Introduction"*, *"Requirements"*, *"Stakeholder Information"*, *"Use Case Diagrams"*, *"Appendix"* etc. in addition to this, custom sections can also be added easily.

Templates      Email Settings      Version Display

Specification Templates Workspace

Specification Templates

- Default
- Integration Project
- TD\_Bank
- CGI\_Req\_Tem
- ABC
- 12\_Verizon
- Business Requirement Template
- NewT


#	Template Name	Template Description	Created By	Created Date	Modified By	Modified Date	Edit	Delete	History
1	<a href="#">Default</a>	Default Template	Administrator	01/10/2017 15:14:56	Administrator	01/10/2017 15:14:56			
2	<a href="#">Integration Project</a>		Administrator	01/11/2017 16:19:04	Administrator	01/11/2017 16:19:04			
3	<a href="#">TD_Bank</a>		Administrator	02/02/2017 02:54:26	Administrator	02/02/2017 02:54:26			
4	<a href="#">CGI_Req_Tem</a>		Administrator	03/08/2017 20:52:20	Administrator	09/14/2017 14:29:45			
5	<a href="#">ABC</a>		Administrator	08/21/2017 17:15:09	Administrator	08/21/2017 17:15:09			
6	<a href="#">12_Verizon</a>		Administrator	08/31/2017 19:32:56	Administrator	08/31/2017 19:32:56			
7	<a href="#">Business Requirement Template</a>		Administrator	09/07/2017 15:37:36	Administrator	09/07/2017 15:37:36			
8	<a href="#">NewT</a>		Administrator	09/12/2017 16:36:08	Administrator	09/12/2017 16:36:08			

Artifacts Tree

- Specification Templates
  - Default
  - Business Template
    - Introduction
    - Purpose
    - Requirements
      - Business Requirements
      - Technical Requirements
  - Enterprise Template
    - Introduction
    - Stakeholder Information
    - Requirements
    - Miscellaneous
  - Sample Template
    - Introduction
    - Scope
    - Requirements
      - Functional Requirements
      - Non-Functional Requirements
    - Use Case Diagrams
    - Appendix

#	Template Name	Template Description	Created By	Created Date	Modified By	Modified Date	Edit	Delete	History
1	<a href="#">Default</a>	Default Template	Administrator	09/19/2016 18:27:39	Administrator	09/19/2016 18:27:39			
2	<a href="#">Business Template</a>		Administrator	09/19/2016 22:27:34	Administrator	09/19/2016 22:27:34			
3	<a href="#">Enterprise Template</a>		Administrator	09/19/2016 23:16:24	Administrator	09/19/2016 23:16:24			
4	<a href="#">Sample Template</a>		Administrator	09/19/2016 23:16:32	Administrator	09/19/2016 23:16:32			

## 2. GUI and Screen Layout

Click on the Module Launchpad icon  on the top left corner and click on “**Requirements Manager**” icon in the Launchpad menu to access the Requirements Manager module.

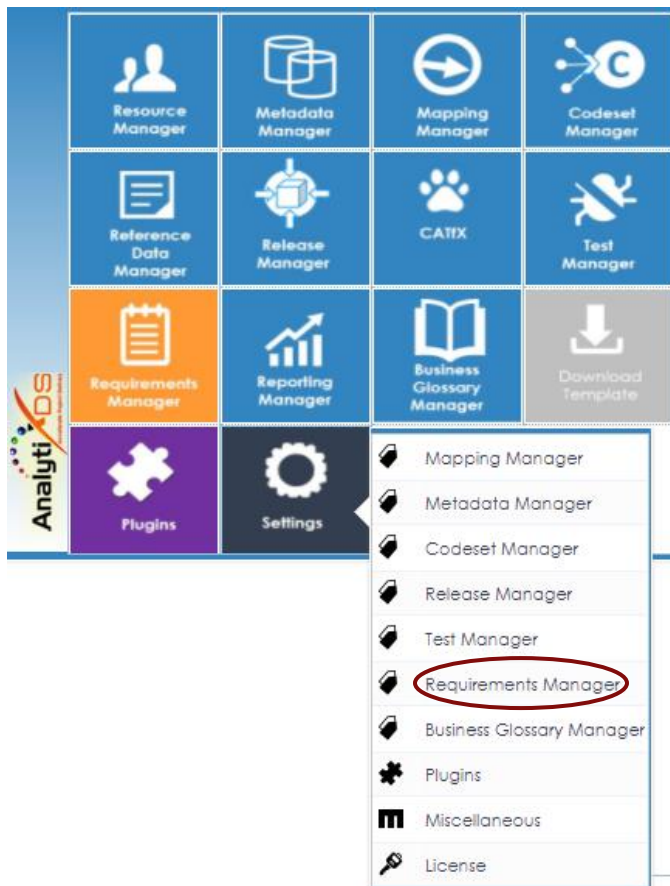


Click on the Requirements Manager icon, it redirects you to ‘**Requirements workspace**’ menu which allows you to create Projects and define specification templates.

Requirements Workspace											
Projects Summary											
#	Project Name	Project Description	Subjects Count	Specifications Count	Specification Artifacts Count	Created By	Created Date	Modified By	Modified Date	Edit	Delete
1	<a href="#">CGI</a>		0	1	1	Administrator	03/08/2017 20:54:43	Administrator	03/08/2017 20:54:43		
2	<a href="#">MFUG_UnionBank</a>		0	1	1	Administrator	02/02/2017 02:22:03	Administrator	02/02/2017 02:22:03		
3	<a href="#">Nativis</a>		0	1	2	Administrator	09/07/2017 16:03:28	Administrator	09/12/2017 16:41:34		
4	<a href="#">ScotiaBank</a>		0	0	0	Administrator	02/02/2017 02:21:50	Administrator	02/02/2017 02:21:50		
5	<a href="#">UB Project</a>		0	3	8	Administrator	01/11/2017 16:21:10	Administrator	01/11/2017 16:21:10		
6	<a href="#">WorldLink</a>		0	1	1	Administrator	01/31/2017 21:25:42	Administrator	01/31/2017 21:25:42		

### 3. How to Define Master Template

Go to Slider Menu and Click on **Settings icon -> Requirements Manager module.**



Click on Requirements Manager under Settings node.

You will have "Default" specification template, you can create your own Templates and create Artifacts for each template.

Specification Templates Workspace		Templates Summary									
		#	Template Name	Template Description	Created By	Created Date	Modified By	Modified Date	Edit	Delete	History
<ul style="list-style-type: none"> <li>Specification Templates <ul style="list-style-type: none"> <li>Default</li> <li>Integration Project</li> <li>TD_Bank</li> <li>CGI_Rea_Tem</li> <li>ABC</li> <li>12_Verizon</li> <li>Business Requirement Template</li> <li>NewT</li> </ul> </li> </ul>			<input type="text"/>	<input type="text"/>	<input type="text"/>						
		1	<a href="#">Default</a>	Default Template	Administrator	01/10/2017 15:14:56	Administrator	01/10/2017 15:14:56			
		2	<a href="#">Integration Project</a>		Administrator	01/11/2017 16:19:04	Administrator	01/11/2017 16:19:04			
		3	<a href="#">TD_Bank</a>		Administrator	02/02/2017 02:54:26	Administrator	02/02/2017 02:54:26			
		4	<a href="#">CGI_Rea_Tem</a>		Administrator	03/08/2017 20:52:20	Administrator	09/14/2017 14:29:45			
		5	<a href="#">ABC</a>		Administrator	08/21/2017 17:15:09	Administrator	08/21/2017 17:15:09			
		6	<a href="#">12_Verizon</a>		Administrator	08/31/2017 19:32:56	Administrator	08/31/2017 19:32:56			
		7	<a href="#">Business Requirement</a>		Administrator	09/07/2017 15:37:36	Administrator	09/07/2017 15:37:36			
		8	<a href="#">NewT</a>		Administrator	09/12/2017 16:36:08	Administrator	09/12/2017 16:36:08			

Right Click on "Specifications Template" node to create a new template and define artifacts.

Artifacts Tree		Templates Summary									
		#	Template Name	Template Description	Created By	Created Date	Modified By	Modified Date	Edit	Delete	History
<ul style="list-style-type: none"> <li>Specification Templates <ul style="list-style-type: none"> <li>Default</li> <li>Create Template</li> <li>Import Template</li> </ul> </li> </ul>			<input type="text"/>	<input type="text"/>	<input type="text"/>						
		1	<a href="#">Default</a>	Default Template	Administrator	09/19/2016 18:27:39	Administrator	09/19/2016 18:27:39			

Create Template

Template Name\*

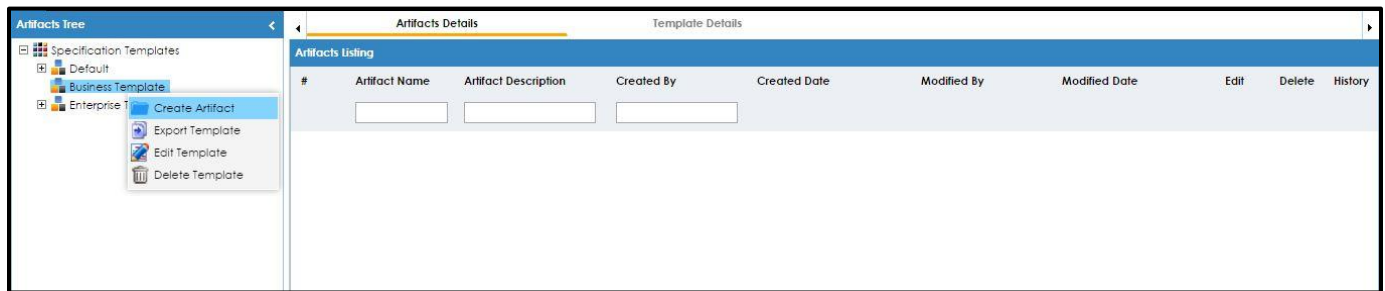
Template Description

Enter Template name, Template Description and click on save icon to create the template.



### 3.1 Create Artifacts

To Create Artifacts, Right Click on the Template created.



Enter Artifact name and the required details.

- **Tree Node Policy:**
  - ✓ Display Always
  - ✓ Don't Display for Single Child
  - ✓ Display on multiple child nodes
- **Support Documents Upload – ON/OFF**
- **Enable Description - ON/OFF**

Enter the required details and select the tree node policy from dropdown and toggle the Support documents upload and enable description by clicking on ON/OFF option.



Create Artifact

Artifact Name\*

Introduction

Artifact Description

A

B

I

U

Introduction pertaining to the specification created for the workflow

Tree Node Policy

Display Always

Support Documents Upload

ON

Enable Description

ON

Mail Comments

Click save icon to create the artifacts successfully.

Artifacts Listing									
#	Artifact Name	Artifact Description	Created By	Created Date	Modified By	Modified Date	Edit	Delete	History
1	<a href="#">Introduction</a>	Introduction pertaining to th	Administrator	12/16/2016 00:28:21	Administrator	12/16/2016 00:28:21			
2	<a href="#">Purpose</a>	Purpose of the Specification	Administrator	12/16/2016 00:30:59	Administrator	12/16/2016 00:30:59			
3	<a href="#">Requirements</a>	Requirements for the workfl	Administrator	12/16/2016 00:31:55	Administrator	12/16/2016 00:31:55			

You can also create child artifacts within the defined Artifacts.

Right Click on any artifacts to create child artifacts in same process as mentioned above.

Templates Summary									
#	Template Name	Template Description	Created By	Created Date	Modified By	Modified Date	Edit	Delete	History
1	<a href="#">Default</a>	Default Template	Administrator	09/19/2016 18:27:39	Administrator	09/19/2016 18:27:39			
2	<a href="#">Business Template</a>		Administrator	09/19/2016 22:27:34	Administrator	09/19/2016 22:27:34			

**Artifacts Tree**

- Specification Templates
  - Default
  - Business Template
  - Introduction
  - Purpose
  - Requirements**

**Create Artifact**

Artifact Name\*

Artifact Description

Tree Node Policy

Display Always

Support Documents Upload ☐

Enable Description ☐

**Artifacts Tree**

- Specification Templates
  - Default
  - Business Template
  - Introduction
  - Purpose
  - Requirements**

**Create Artifact**

Artifact Name\*

Business Requirements

Artifact Description

Tree Node Policy

Display Always

Support Documents Upload ☒

Enable Description ☒

Click on save icon to create the child artifacts.

**Artifacts Tree**

- Specification Templates
  - Default
  - Business Template
  - Introduction
  - Purpose
  - Requirements**
    - Business Requirements
    - Technical Requirements

**Artifact View**

Artifact Name\*

Requirements

Artifact Description

Tree Node Policy

Display Always

Support Documents Upload ☒

Enable Description ☒

You can view the list artifacts creates on the right side window.

Artifacts Tree

Specification Templates

Default

Business Template

Introduction

Purpose

Requirements

Artifacts Details

Template Details

Artifacts Listing

#	Artifact Name	Artifact Description	Created By	Created Date	Modified By	Modified Date	Edit	Delete	History
	<input type="text"/>	<input type="text"/>	<input type="text"/>						
1	<a href="#">Introduction</a>		Administrator	09/19/2016 22:55:56	Administrator	09/19/2016 22:55:56			
2	<a href="#">Purpose</a>		Administrator	09/19/2016 22:56:16	Administrator	09/19/2016 22:56:16			
3	<a href="#">Requirements</a>		Administrator	09/19/2016 22:56:28	Administrator	09/19/2016 22:56:28			

Once the templates are created, you can create your own custom forms.

Go to the Templates created and Click on any artifact (E.g. **Introduction** artifact), once you click on the artifact the view will be changed on the right side window.

You can view “**Artifact view**” and “**Form Designer**” tabs.

Templates		Email Settings	Version Display
Specification Templates Workspace		Artifact View	Form Designer

- Specification Templates
  - Default
  - Business\_Template
    - Demo\_Ent\_Std
    - Business\_Template\_1
      - Introduction
      - Purpose
      - Requirements

**Artifact Name\***

Introduction

**Artifact Description**

Introduction pertaining to the specification created for the workflow

**Created By**

Administrator

**Created Date**

12/16/2016 00:28:21

**Last Modified By**

Administrator

**Last Modified Date**

12/16/2016 00:28:21

**Tree Node Policy**

Display Always

**Support Documents Upload**

ON

**Enable Description**

ON

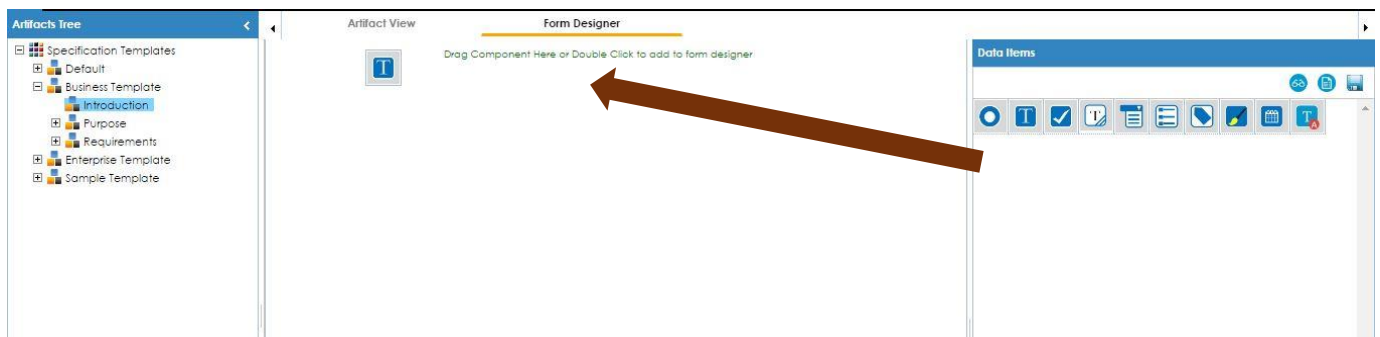
**Mail Comments**

## 3.2 Define Custom forms

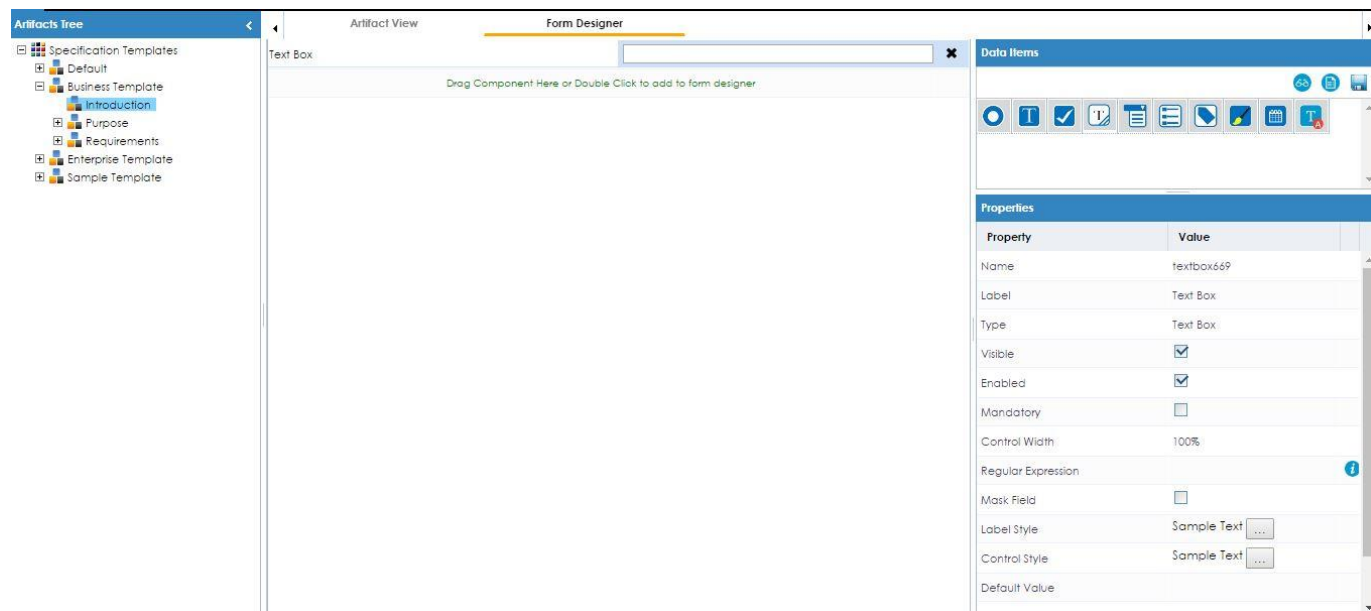
Click on **“Form Designer”** tab to create your own custom forms.



On the Right side window you have Data Items with all the components which you can use to create your own custom form by using Drag and drop the components (or) Double click to add to the form designer.



Double click the text box window to rename the form based on your requirement, you can build your own components and define the template and can use the same across all projects.




Now, in the same way you can drag and drop the required components to define your own template by renaming the components.

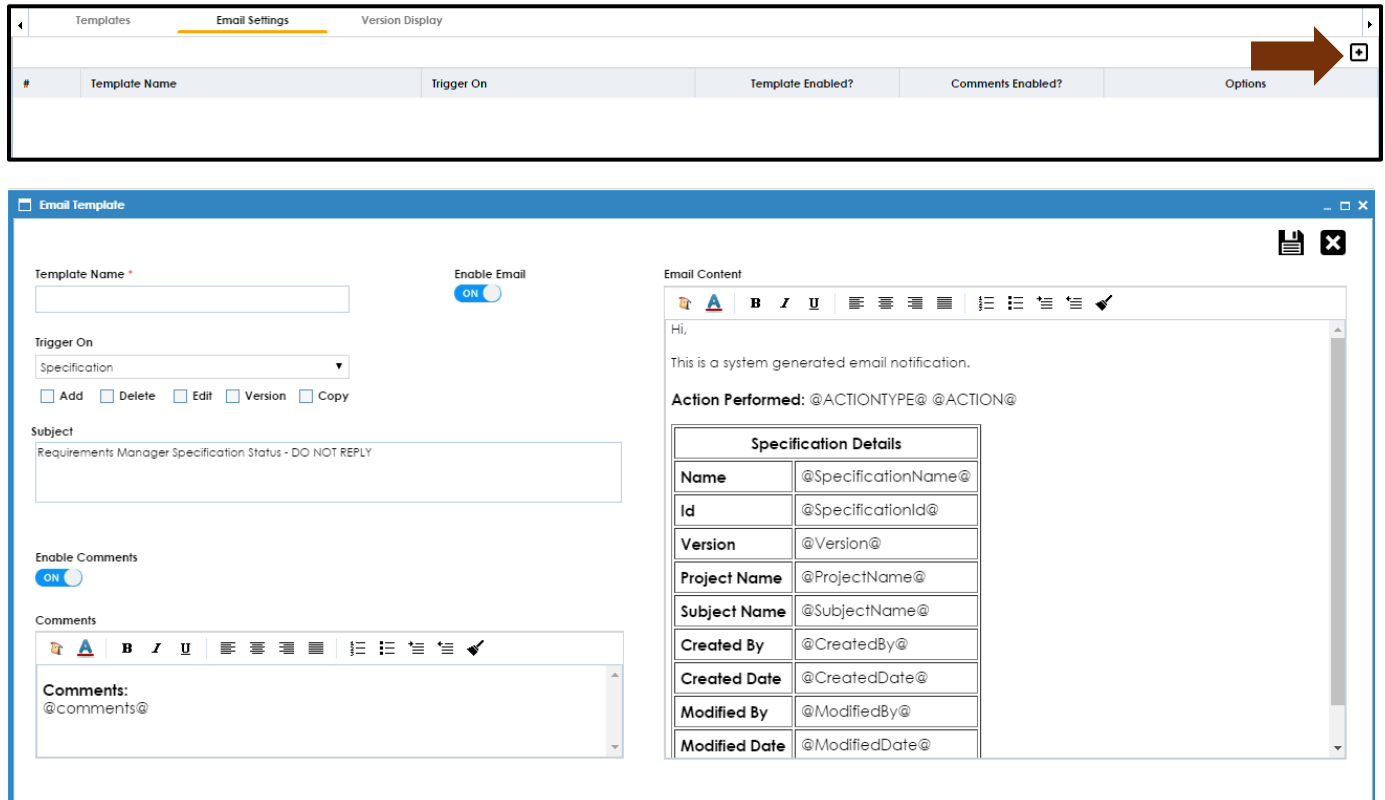
Also, to enable your own workflow you can even add dropdown components in the form designer and configure them accordingly.

This is how you create your form designer and use the same under Requirements module as a template and link it to mapping manager for better traceability.

### 3.3 Add Email Template

Under **Email Settings** tab, Click on the  icon, to add email template for the requirements and the mail options can be configured for the notifications here like:

- ✓ Email Subject
- ✓ Email Body

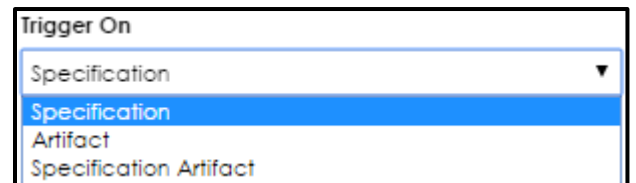


The screenshot shows the 'Email Settings' tab in the top navigation bar. Below it is a table with columns: #, Template Name, Trigger On, Template Enabled?, Comments Enabled?, and Options. A red arrow points to a plus icon in the top right corner of the table. Below the table is a detailed view of the 'Email Template' configuration window. This window includes fields for 'Template Name', 'Trigger On' (a dropdown menu), 'Subject', 'Enable Email' (a toggle switch), 'Enable Comments' (a toggle switch), and a 'Comments' text area. On the right side of the window is the 'Email Content' editor, which contains a rich text editor with a toolbar and a preview area showing a sample email notification with a table of 'Specification Details'.

Specification Details	
Name	@SpecificationName@
Id	@SpecificationId@
Version	@Version@
Project Name	@ProjectName@
Subject Name	@SubjectName@
Created By	@CreatedBy@
Created Date	@CreatedDate@
Modified By	@ModifiedBy@
Modified Date	@ModifiedDate@

Enter the following details:

- Template Name
- Choose from the dropdown, the Trigger On, that will be applied on Specification, Artifact or Specification Artifact with checkboxes of :
  - Add
  - Delete
  - Edit
  - Version
  - Copy
- Subject of the Email
- Comments
- Email Content



The screenshot shows a dropdown menu titled 'Trigger On'. The menu is open, showing four options: 'Specification', 'Specification', 'Artifact', and 'Specification Artifact'. The first 'Specification' option is highlighted with a blue background.

Click the save  icon, when done, to apply the notifications on the Specifications created.

Mapping Manager v8.2

Requirements Manager Settings

Email Settings Successfully Saved

←

Templates

Email Settings

Version Display

#	Template Name	Trigger On	Template Enabled?	Comments Enabled?	Options			
1	ADS_MailStd	Artifact	✓	✓	?	✎	✕	↺
2	ADS Template	Specification	✓	✓	?	✎	✕	↺

### 3.4 Configure Version Display

Provides the Version Display options for a Specification Name.

Users have the choice to select the Specification Version Display Option for the newly created specifications based on the standard version capability.

Select the corresponding checkboxes to enable Specification Version Display across the application.

←

Templates

Email Settings

**Version Display**

Specification Version Display Option

☒ Standard Specification Version
 ☐ Version Label
 ☐ Do Not Display Version

E.g. If Specification Details are as follows:

Specification Name: Datamart Specification

Requirements Manager Version: 1.03

Version Label : Version 21.2 Beta

Specifications in the Projects browser will display as follows depending on the option selected:

Standard Specification Version: Datamart Specification (v1.03)

Version Label : Datamart Specification (Version 21.2 Beta)

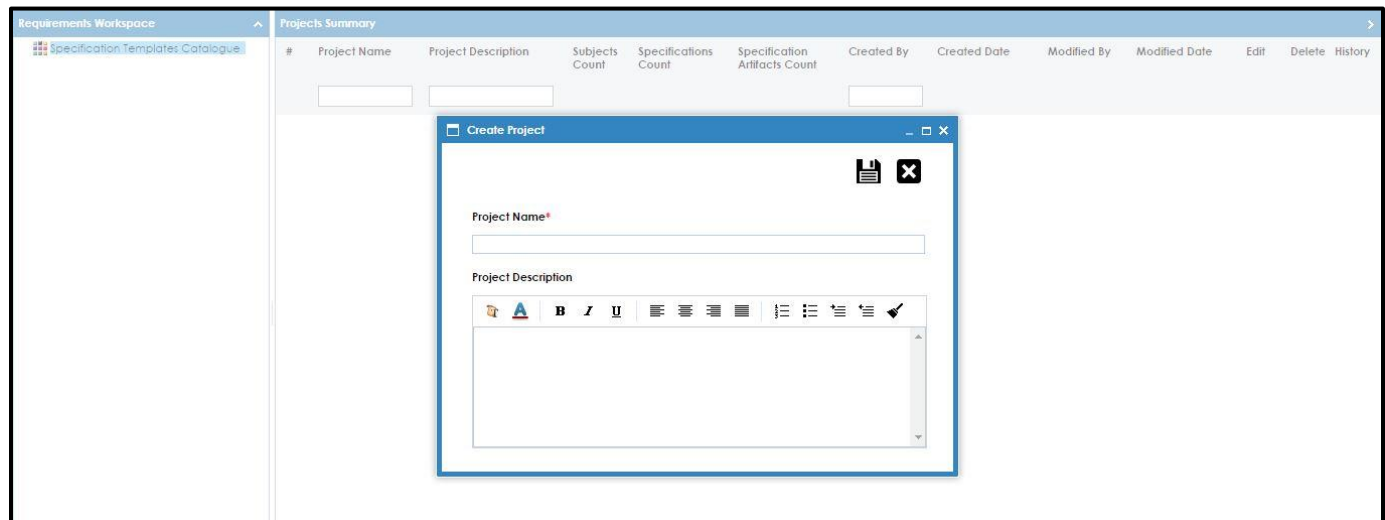
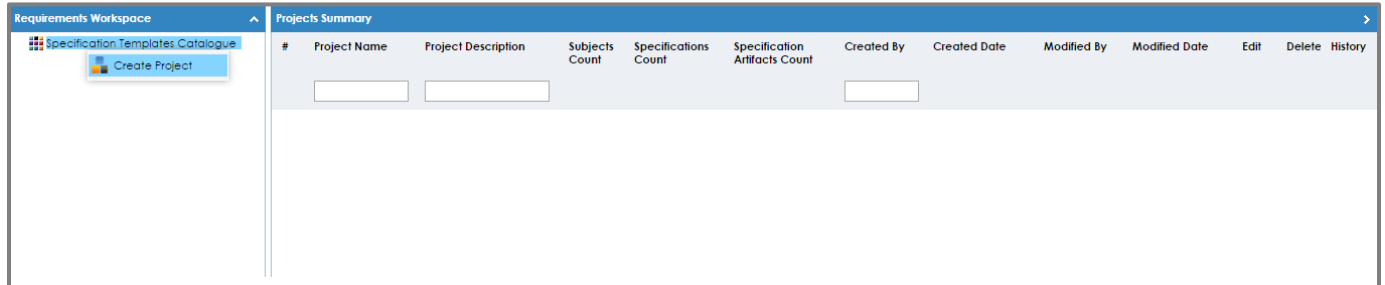
Do Not Display Version: Datamart Specification

**NOTE:** If the mapping version display option is selected as “Version Label”, and the version label is blank, then the Specification name will include the actual version number instead of the blank version label.

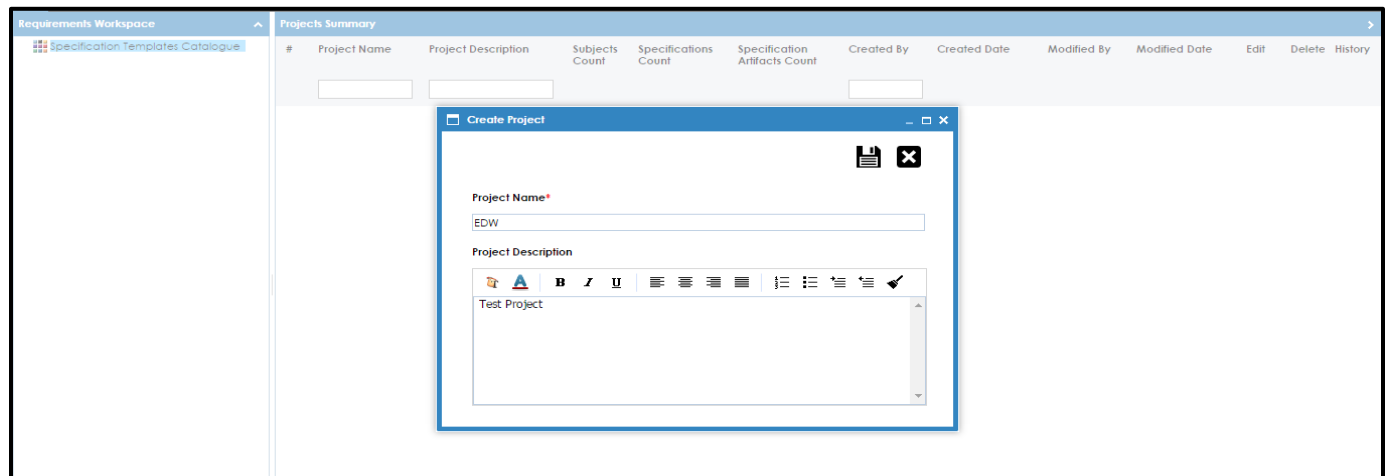
## 4. Create Project and Specification Templates.

Go to Slider menu and click on Requirements Manager module

Right Click on the Speciation Template Catalogue to Create a New Project



Enter Project name and Project Description,



Click on save icon to create a new Project.



Requirements Workspace

Specification Templates Catalogue

UB\_Project (1)

WorldLink (1)

ScotiaBank (0)

MFUG\_UnionBank (1)

CGI (1)

Natixis (1)

EDW (0)

Projects Summary

#	Project Name	Project Description	Subjects Count	Specifications Count	Specification Artifacts Count	Created By	Created Date	Modified By	Modified Date	Edit	Delete	History
	<input type="text"/>	<input type="text"/>				<input type="text"/>						
1	<a href="#">CGI</a>		0	1	1	Administrator	03/08/2017 20:54:43	Administrator	03/08/2017 20:54:43			
2	<a href="#">EDW</a>	Test Project	0	0	0	Administrator	09/15/2017 14:55:41	Administrator	09/15/2017 14:56:46			
3	<a href="#">MFUG_UnionBank</a>	Test Project	0	1	1	Administrator	02/02/2017 02:22:03	Administrator	02/02/2017 02:22:03			
4	<a href="#">Natixis</a>		0	1	2	Administrator	09/07/2017 16:03:28	Administrator	09/12/2017 16:41:34			
5	<a href="#">ScotiaBank</a>		0	0	0	Administrator	02/02/2017 02:21:50	Administrator	02/02/2017 02:21:50			
6	<a href="#">UB_Project</a>		0	3	8	Administrator	01/11/2017 16:21:10	Administrator	01/11/2017 16:21:10			
7	<a href="#">WorldLink</a>		0	1	1	Administrator	01/31/2017 21:25:42	Administrator	01/31/2017 21:25:42			

Project Summary gives you the list of Projects with Project name, Description, Subject Counts, Specification Counts, and Specification Artifacts Count with audit details. User have an option to Edit, Delete the project and view the Activity log by clicking on History icon.

Click on the “EDW” Project, it displays **Specification Details**, **Project Details** and **Project Users** with Summary.

### Specification Details:

Requirements Workspace

Specification Templates Catalogue

NProject1 (0)

Specifications

EDW (1)

Specifications

EDW Template (v1.00)

Introduction

Purpose

Requirements

Business Requirements

Technical Requirements

Summary

1

Pending Review

Pending Approval

Approved

Published

Rejected

Specifications Details

Project Details

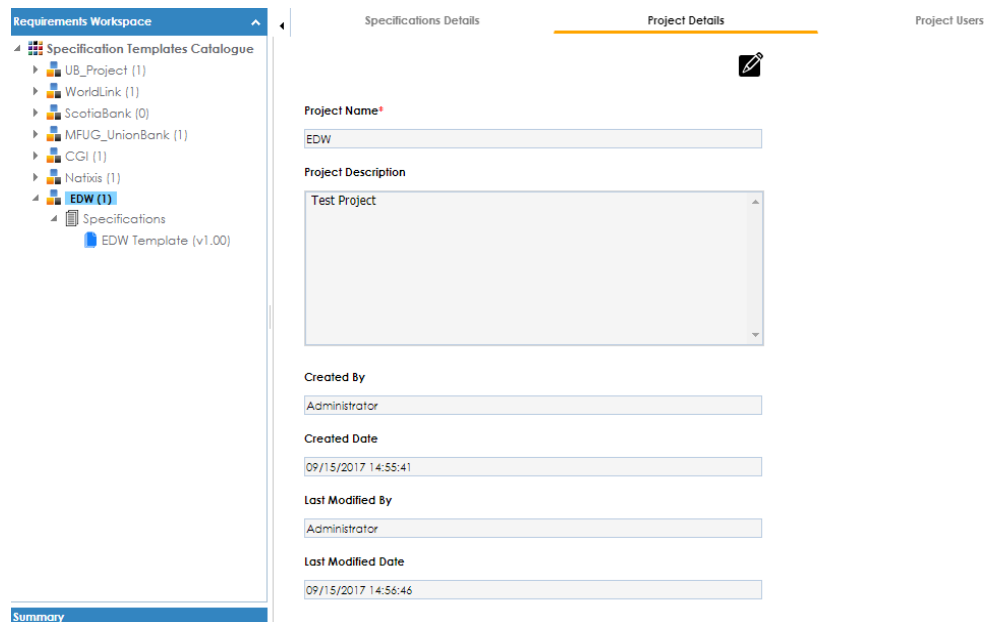
Project Users

Specifications Listing

#	Specification Id	Specification Name	Subject Hierarchy	Specification Description	Status	Created By	Created Date	Modified By	Modified Date	Edit	Delete	History
1	3	EDW_Template			Pending Review	Administrator	12/16/2016 20:22:45	Administrator	12/16/2016 20:22:45			

## Project Details:

Any updates that needs to be done, after creating the Project, can be done by clicking the  icon.



**Requirements Workspace**

- Specification Templates Catalogue
  - U8\_Project (1)
  - WorldLink (1)
  - ScotiaBank (0)
  - MFUG\_UnionBank (1)
  - CGI (1)
  - Nafixis (1)
  - EDW (1)**
    - Specifications
      - EDW Template (v1.00)

**Summary**

**Specifications Details** | **Project Details** | Project Users

**Project Name\***  
EDW

**Project Description**  
Test Project

**Created By**  
Administrator

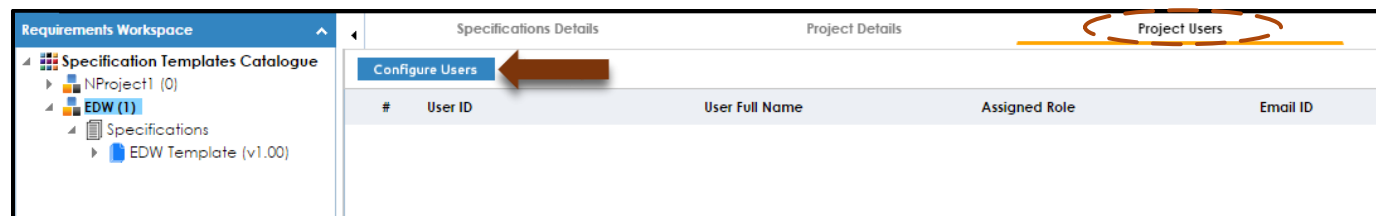
**Created Date**  
09/15/2017 14:55:41

**Last Modified By**  
Administrator

**Last Modified Date**  
09/15/2017 14:56:46

## Project Users:

If user wants to associate other Users related to the Project, this can be done under “**Project Users**” tab, by clicking the **Configure Users** icon and Select the required number of users, and click the Save icon.



**Requirements Workspace**

- Specification Templates Catalogue
  - NProject1 (0)
  - EDW (1)**
    - Specifications
      - EDW Template (v1.00)

**Specifications Details** | **Project Details** | **Project Users**

**Configure Users**

#	User ID	User Full Name	Assigned Role	Email ID

Assign Users

#

Assign User

User ID

User Full Name

Assigned Roles

1	<input type="checkbox"/>	dqouser1	dqouser1	Business, Governance, Subject Matter Expert
2	<input checked="" type="checkbox"/>	user1	user1	UserRole1
3	<input checked="" type="checkbox"/>	srole	srole	srole
4	<input type="checkbox"/>	public	public - Default System User	public
5	<input type="checkbox"/>	RajUser	RajUser	RajUser
6	<input type="checkbox"/>	shiva	shiva	Business1

Note: Only Non-Administrator Id's are displayed here

Requirements Workspace

Specification Templates Catalogue

NProject1 (0)

EDW (1)

Specifications

EDW Template (v1.00)

Specifications Details

Project Details

Project Users

Project user assigned successfully

Configure Users

#	User ID	User Full Name	Assigned Role	Email ID
---	---------	----------------	---------------	----------

Right Click on “**Specifications**” node to create a new Specification Template.

Requirements Workspace

Specification Templates Catalogue

EDW (0)

Specifications

Create Specification

Import Specification

Specifications Listing

#	Specificat ID	Specification Name	Subject Hierarchy	Specification Description	Specification Status	Created By	Created Date	Modified By	Modified Date	Edit	Delete	History
---	---------------	--------------------	-------------------	---------------------------	----------------------	------------	--------------	-------------	---------------	------	--------	---------

Summary

Pending Review

Pending Approval

Approved

Published

Rejected

Create Specification allows you to select Specification Template type from the dropdown, AMM provides “Default” Template and allows the end user to create Speciation Template types based on their requirement under Settings module which will be displayed under dropdown while creating a specification.

- Specification Template Type – Templates are configurable under “**Settings module**”
- Specification Name
- Specification Version
- Version Label
- Specification Description
- Specification Owner
- Status:
  - ✓ Pending review
  - ✓ Pending Approval
  - ✓ Approved
  - ✓ Published
  - ✓ Rejected.
- Mail Comments

**Create Specification**

**Specification Template Type**  
Default

**Specification Template Description**  
Default Template

**Specification Name\***

**Specification Version**  
1.00

**Version Label**

**Specification Description**

**Specification Owner**  
-Select Owner-

**Status**  
Pending Review

**Mail Comments**

**Create Specification**

**Specification Template Type**

- Default
- Integration Project
- TD\_Bank
- CGI\_Req\_Tem
- ABC
- 12\_Verizon
- Business Requirement Template
- NewT

**Specification Description**

**Specification Owner**

-Select Owner-

**Status**

Pending Review

**Mail Comments**

**Specification Version**

1.00

**Version Label**

Select the Template type from the dropdown and enter the required details.

**Create Specification**

**Specification Template Type**

Integration Project

**Specification Template Description**

**Specification Name**

**Specification Version**

1.00

**Version Label**

**Specification Owner**

-Select Owner-

**Status**

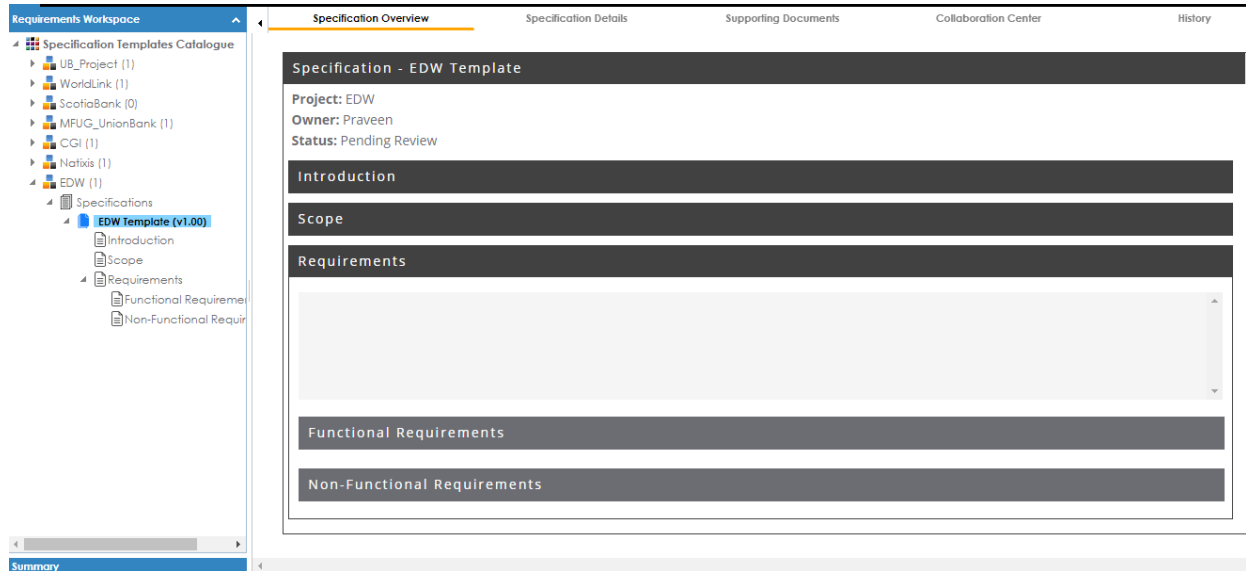
Pending Review

**Mail Comments**

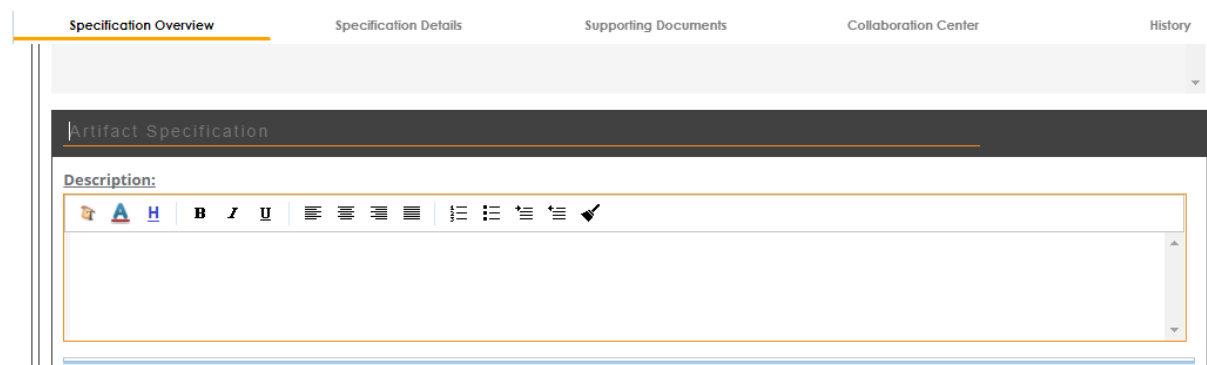
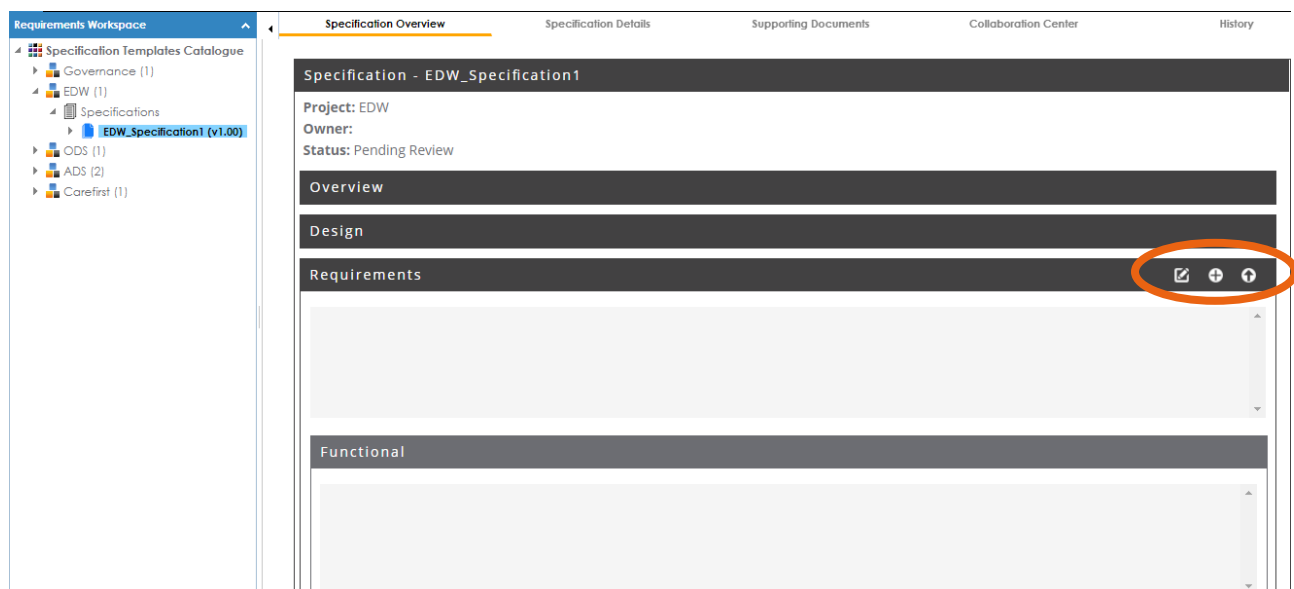
Click on the save icon to create the specification.

Once the specification is created you can see all artifacts that are defined and will follow the standard template (E.g., EDW Template) that have been defined.

**Specification Overview:** We can see the specification details in this tab including the Introduction, Scope, Requirements etc.



Here you have an option to add child specifications artifacts from UI, hover the mouse to Requirements (Specification), where you can see Add, Edit and Collapse icons to manager the artifacts directly.



**Specification Details:** The details about the specification including its id, spec name, spec template type etc.

**Requirements Workspace**

- Specification Templates Catalogue
  - UB\_Project (1)
  - WorldLink (1)
  - ScotiaBank (0)
  - MFUG\_UnionBank (1)
  - CGI (1)
  - Natixis (1)
  - EDW (1)
    - Specifications
      - EDW Template (v1.00)**
        - Introduction
        - Scope
        - Requirements
          - Functional Requirements
          - Non-Functional Requirements

**Specification Overview** **Specification Details** Supporting Documents Collaboration Center History

**Specification Id**  
16

**Specification Name\***  
EDW Template

**Specification Template Type**  
Integration Project

**Specification Template Description**

**Specification Version**  
1.00

**Version Label**

**Created By**  
Administrator

**Created Date**  
09/15/2017 15:20:56

**Specification Description**

**Specification Owner**  
Praveen

**Status**  
Pending Review

**Mail Comments**

**Last Modified By**  
Administrator

**Last Modified Date**  
09/15/2017 15:20:56

**Summary**

Now by this way you can go ahead and create your requirements and test specs. Users can create their own custom templates.

Right Click on Template to define New Introduction, purpose and New Requirements.

Users also have an option to Create New Version, preview the specification, Share the link, Export specification, Copy the specification and can also delete the specification.

**Supporting Documents:** We can see the list of supporting documents to the Specification in the Supporting Document tab. We can also add the documents from here itself by clicking on the "+ icon"

**Requirements Workspace**

- Specification Templates Catalogue
  - UB\_Project (1)
  - WorldLink (1)
  - ScotiaBank (0)
  - MFUG\_UnionBank (1)
  - CGI (1)
  - Natixis (1)
  - EDW (1)
    - Specifications
      - EDW Template (v1.00)**
        - Introduction
        - Scope
        - Requirements
          - Functional Requirements
          - Non-Functional Requirements

**Specification Overview** **Specification Details** **Supporting Documents** Collaboration Center History

**+**

#	Document Name	Document Description	Document Owner	Document Status	Document Type	Document Link	Created By	Created Date	Modified By	Modified Date

Use browse option to select the file to upload and click on save after giving all the details.

Specification Overview Specification Details Supporting Documents Collaboration Center History

**New Document Form**

Document Name\* Doc2

Document Owner Praveen

Document Object Drag-n-Drop files here or click to select files for upload. **Browse**

Document Description

Approval Required Flag ☐

**Collaboration Center:** This feature helps us to communicate between the stakeholders who have permission to the topic. Users can add topic and communicate internally.

Requirements Workspace Specification Overview Specification Details Supporting Documents Collaboration Center History

Specification Templates Catalogue

- UB\_Project (1)
- WorldLink (1)
- ScotiaBank (0)
- MFUG\_UnionBank (1)
- CGI (1)
- Natixis (1)
- EDW (1)
  - Specifications
    - EDW Template (v1.00)**
      - Introduction
      - Scope
      - Requirements
        - Functional Requirement
        - Non-Functional Requirement

**Add Topic**

Topic Name\*: Req2\_Discussion

Description: Need to discuss and freeze the Spec

**User Assignment**

Check	User	Icon
<input checked="" type="checkbox"/>	Administrator	
<input type="checkbox"/>	arun	
<input checked="" type="checkbox"/>	arunm	
<input checked="" type="checkbox"/>	bmarley	
<input type="checkbox"/>	jdenver	
<input checked="" type="checkbox"/>	jennon	
<input type="checkbox"/>	jmartin	



**History:** We can also track the history of the specification using the History tab as shown below.

erwin Requirements Workspace

Specification Templates Catalogue

UB\_Project (1)

WorldLink (1)

ScotiaBank (0)

MFUG\_UnionBank (1)

CGI (1)

Natixis (1)

EDW (1)

Specifications

EDW Template (v1.00)

Introduction

Scope

Requirements

Functional Requirement

Non-Functional Requirement


Specification Overview

Specification Details

Supporting Documents

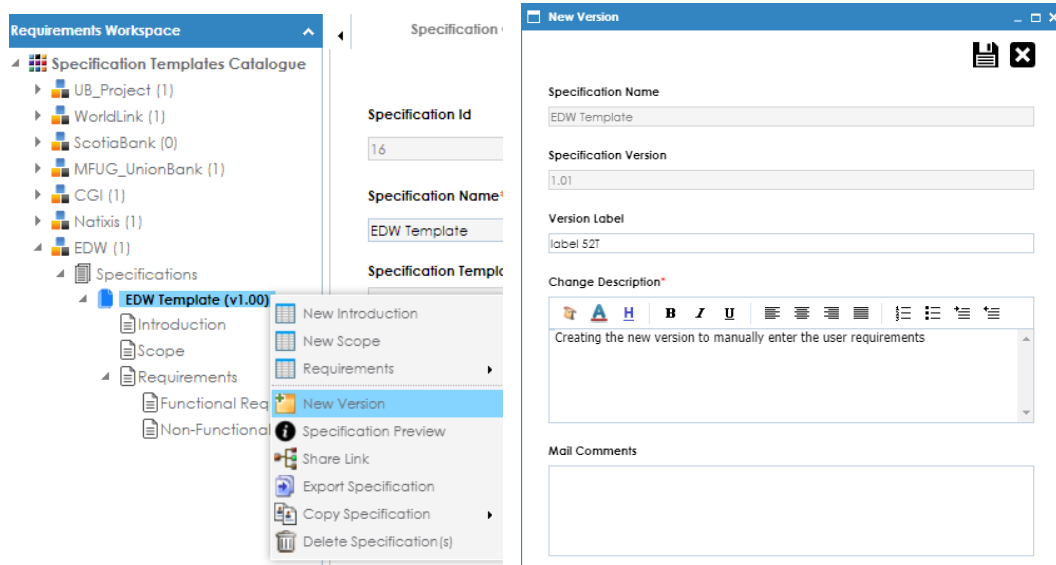
Collaboration Center

History

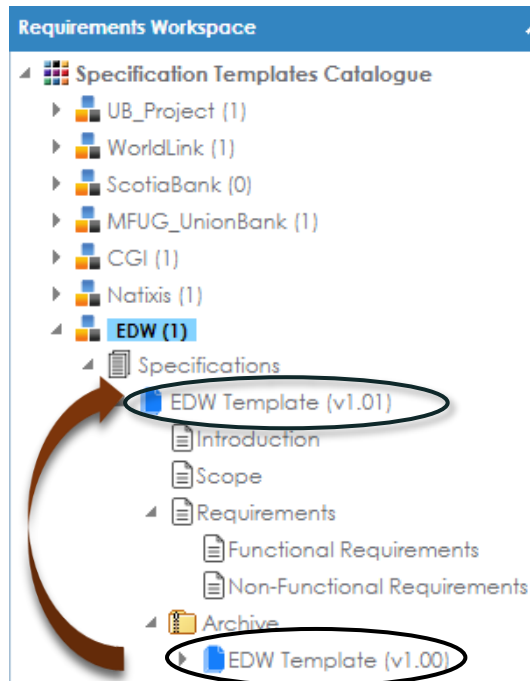
#	Type	Details	Date	User
1		<div>Specification Id : 16</div> <div>Subject Id : -1</div> <div>Specification Version : 1.00</div> <div>Status : Active</div> <div>Template Id : 2</div> <div>Version Label :</div> <div>Project Id : 11</div> <div>Specification Name : EDW Template</div> <div>Specification State Id : 0</div> <div>Specification State : Pending Review</div> <div>Template Name : Integration Project</div> <div>Specification Owner : Praveen</div>	09/15/2017 15:20:56	Administrator

## 4.1 Create a New Version

1. Right Click on a Specification and Select the "New Version" option
2. In the pop-up window, enter the Change Description (mandatory) and Version Label (optional) and click the Save icon.



3. New Version was successfully created with the default versioning capability, and the previously active version is now displayed under the archive folder with read-only permissions



All previously versioned Specifications templates located in the archive folder are read-only and cannot be edited

The Specification Version Number will increment automatically

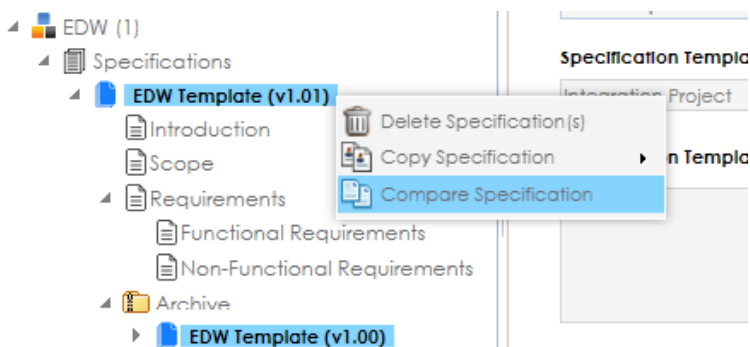
Version Label is a label that can be applied by any user

The system forces the user to enter a change description for audit control purposes

## 4.2 Specification Comparison

### (Compare two different Specification Versions for the changes)

- Select any two Specification document versions, Right click and Select the "Compare Specification" option.
- The Specification Comparison Report, compares the changes by taking the passive version as the Reference.
- All Changes between the versions are highlighted in **RED** color.
- The Comparison Report generated will have the changes depicted in parallel window.



Specification Comparison Report			Date :09/15/2017
Specification:	EDW Template	EDW Template	
Project:	EDW	EDW	
Owner:	Praveen	Praveen	
Status:	Pending Review	Pending Review	
Template:	Integration Project	Integration Project	
Version:	1.01	1.00	
Introduction			
Scope			
Requirements			
Functional Requirements			
Non-Functional Requirements			

### 4.3 Copy/Paste of Specification Documents

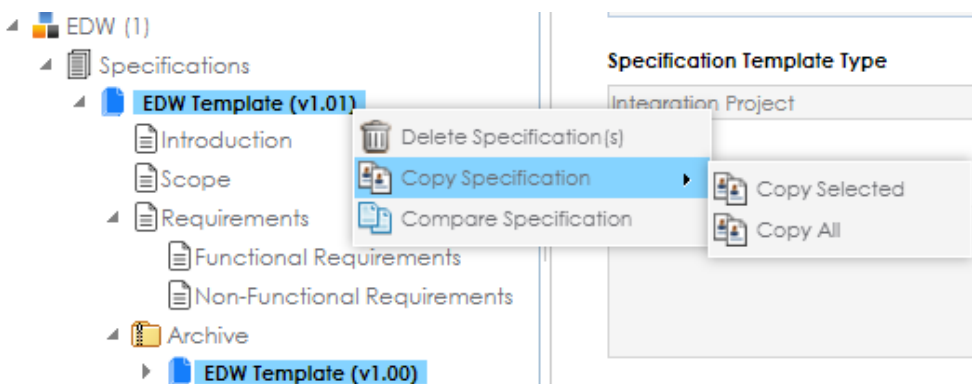
Copy Specification Documents are done in two ways:

- Copy Specification by selecting Copy Selected
- Copy Specification by selecting Copy All

Right click on a specification document that you want to copy/paste and select the “Copy Specification” option.

#### ✓ Copy Selected:

Right click on the V1.01 spec doc and choose the “Copy Selected” option and paste into the destination Project/Subject Area. This will create a new v1.00 specification version in the destination Project/Subject Area.

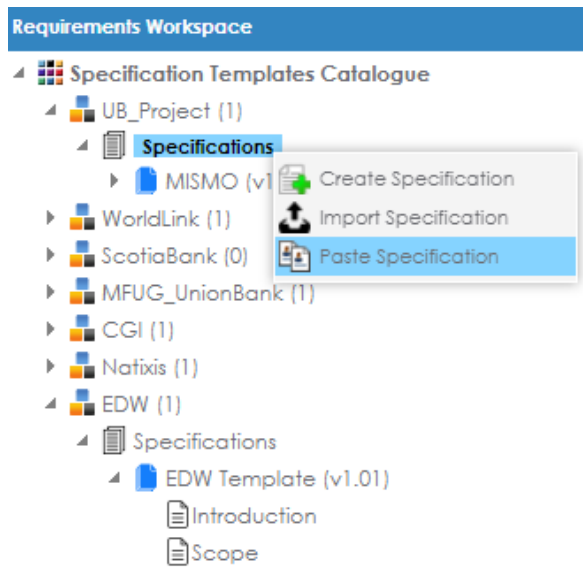


#### ✓ Copy All:

Right click on the V1.01 mapping and choose the “Copy All” option and paste into the destination Project/Subject Area. This will create a new v1.02 specification version (along with archived version V1.00) in the destination Project/Subject Area.

Select the Destination Project/Subject Area and right click on the “Specifications” option and select the “Paste Specification” option.

The newly pasted map is displayed under the selected destination Project/Subject Area



**This way user goes along with the Requirement Manager Module and will follow the steps to create the Requirement gathering for the workflow designed for the Source-to-Target Mapping.**



Step3: You can add the new column 'Specification Artifacts' to the mapping grid by right clicking on the column header. Once you click on the column header, you can see the 'Specification Artifacts' column and check that box to appear in the grid.

The screenshot shows the 'Mapping Specification' window with a grid of mapping data. A right-click context menu is open over the 'Specification Artifacts' column header. The menu options are: CSM Mapping, ☒ Specification Artifacts, ☐ Reference Table, ☒ Business Rule, ☐ Extended Business Rule Transformation, ☐ Lookup Reference Column, ☐ Lookup On, and ☐ Trans Lookup Condition. A red arrow points from the text 'Right click on the column heading to list the columns' to the context menu.

#	Target System Name	Target Environment Name	Target Table Name	Target Column Name	Specification Artifacts	Business Rule	Source System	Source Environment Name	Source Column Name
18	3rd Party Flat Files	Product Flat Files	dbo.Employees	ReportsTo				Customer Flat Files	dbo.Employees
11	3rd Party Flat Files	Product Flat Files	dbo.Employees	Region				Customer Flat Files	dbo.Employees
19	3rd Party Flat Files	Product Flat Files	dbo.Employees	PhotoPath		LTRIM	3rd Party Flat Files	Customer Flat Files	dbo.Employees
4	3rd Party Flat Files	Product Flat Files	dbo.Employees	FirstName		LTRIM	3rd Party Flat Files	Customer Flat Files	dbo.Employees
5	3rd Party Flat Files	Product Flat Files	dbo.Employees	Title		LTRIM	3rd Party Flat Files	Customer Flat Files	dbo.Employees

Once you add 'Specification Artifact' column to the grid, you can now drag and drop the entire requirement into the Mapping Grid as shown below.

The screenshot shows the 'Mapping Specification' window with the 'Specification Artifacts' column added to the grid. A red dashed line indicates a requirement artifact being dragged from the 'Specification Artifact Catalogue' on the right into the 'Specification Artifacts' column of the grid. The grid data is the same as in the previous screenshot.

#	Target System Name	Target Environment Name	Target Table Name	Target Column Name	Specification Artifacts	Business Rule	Source System	Source Environment Name	Source Column Name
11	3rd Party Flat Files	Product Flat Files	dbo.Employees	Region			3rd Party Flat Files	Customer Flat Files	dbo.Employees
10	3rd Party Flat Files	Product Flat Files	dbo.Employees	City		LTRIM	3rd Party Flat Files	Customer Flat Files	dbo.Employees
19	3rd Party Flat Files	Product Flat Files	dbo.Employees	PhotoPath		LTRIM	3rd Party Flat Files	Customer Flat Files	dbo.Employees
4	3rd Party Flat Files	Product Flat Files	dbo.Employees	FirstName		LTRIM	3rd Party Flat Files	Customer Flat Files	dbo.Employees
5	3rd Party Flat Files	Product Flat Files	dbo.Employees	Title		LTRIM	3rd Party Flat Files	Customer Flat Files	dbo.Employees

Edit the Mapping Specification and Click on any Specification Artifact Catalogue on the right hand side window, now Drag and Drop it into the grid under Specification artifact column.

Once you Drag and Drop the Specification artifact into the grid with the entire spec doc as a requirement, it creates a hyperlink as shown in the below image.

Click on "Save" icon to save the map.

The screenshot shows the Erwin Mapping Specification tool interface. The main window displays a table of mapping specifications. The table has columns for Target System Name, Target Environment Name, Target Table Name, Target Column Name, Specification Artifacts, Business Rule, Source System Name, and Source Environment Name. The table lists several mappings for '3rd Party Flat Files' to 'Product Flat Files' in the 'dbo.Employees' table, with various target columns like LastName, Region, Photo, EmployeeID, and City. The Specification Artifacts column contains hyperlinks to specific artifacts, such as '[SPECIFICATION\_ARTIFACT]:Governance//FAI' and '[SPECIFICATION]:Governance//FACETS\_PHASE\_1\_DEV (v1.00)'. The right sidebar shows the Metadata Catalogue and Specification Artifact Catalogue, with the selected artifact 'FACETS\_PHASE\_1\_DEV (v1.00)' highlighted.

#	Target System Name	Target Environment Name	Target Table Name	Target Column Name	Specification Artifacts	Business Rule	Source System Name	Source Environment Name
3	3rd Party Flat Files	Product Flat Files	dbo.Employees	LastName	[SPECIFICATION_ARTIFACT]:Governance//FAI	LTRIM	3rd Party Flat Files	CU File
11	3rd Party Flat Files	Product Flat Files	dbo.Employees	Region	[SPECIFICATION]:Governance//FACETS_PHASE_1_DEV (v1.00)	LTRIM	3rd Party Flat Files	CU File
2	3rd Party Flat Files	Product Flat Files	dbo.Employees	Photo	[SPECIFICATION]:Governance//FACETS_PHASE_1_DEV (v1.00)		TEST	TE File
1	3rd Party Flat Files	Product Flat Files	dbo.Employees	EmployeeID	[SPECIFICATION]:Governance//FACETS_PHASE_1_DEV (v1.00)	LTRIM1	3rd Party Flat Files	CU File
10	3rd Party Flat Files	Product Flat Files	dbo.Employees	City	[SPECIFICATION]:EDW//EDW_Specification1/	LTRIM	3rd Party Flat Files	CU File

Click on Hyperlink under “Specification Artifact” column to view the details as below.

The screenshot shows the 'Specification Artifact Details' window. The title bar indicates the artifact is 'Specification - FACETS\_PHASE\_1\_DEV'. The window displays project information: Project: Governance, Owner: John Doe, Status: Pending Review. Below this is a section for 'Functional' requirements, listing FNC001, FNC002, and FNC003, each with a 'Description:' label. There is also a section for 'Non-Functional' requirements, listing NF001, NF002, and NF003, each with a 'Description:' label. The window has a sidebar with tabs for Overview, Design, Requirements, Functional, and Non-Functional, with 'Functional' currently selected.

**Specification - FACETS\_PHASE\_1\_DEV**

**Project:** Governance  
**Owner:** John Doe  
**Status:** Pending Review

**Overview**

**Design**

**Requirements**

**Functional**

FNC001:  
 Description:  
 FNC002:  
 Description:  
 FNC003:  
 Description:

**Non-Functional**

NF001:  
 Description:  
 NF002:  
 Description:  
 NF003:  
 Description: